

TY2011 Host and Personal Computer Tune-up Document – Windows 7

November 21, 2011

Revision to October 24 document: The requirement to install .NET Framework 4.0 Extended was moved from the “All Computers” section to the “TaxWise Desktop” section. The Extended package is only required for the desktop version.

Summary. This document provides the National Technology Committee general tune-up recommendations for non-AARP Foundation Tax-Aide computers using the Windows 7 Professional operating system, i.e., personal computers and host computers, excluding IRS depot computers, used in the Tax-Aide program. They can also be used on non-Professional version Windows computers, but some of the procedures may not be available on those versions and/or the steps may be slightly different. These procedures make all the changes necessary to bring these computers to approximately the same state as the Tax-Aide imaged computers.

The best option for assuring your AARP Foundation Tax-Aide purchased computer meets the tune-up recommendations is to download and install the appropriate Windows image from the image download site, www.taxaideaarp.org. The images can also be applied to Tax-Aide donated computers. If, for some reason, the images can't be applied to your donated computer, these procedures should be used for the donated computer.

Introduction. This document is written primarily for personal and host computers. It is also applicable to computers that are donated to the Tax-Aide program that can't, or the user doesn't want to, be imaged using the Tax-Aide developed images. For instance, the reason a user may not want to image their computer is that they have customized it with several programs and they don't want to have to re-install those programs on the images. Or, it may contain a lot of data that the user doesn't want to transfer to a re-imaged computer.

Because of the multitude of possible computers and Windows configurations to be addressed in this document, it is not feasible to provide exact procedures that will fit every situation. So, there may be some interpretation on your part if the procedure listed doesn't match your configuration, exactly. In these cases, Windows Help or a Google search may help with the procedure.

Some of these steps verify settings that may have already been established on your computer. Several of the steps assume that your computer is connected to the Internet via a broadband connection. If this is not the case, contact your district Technology Coordinator to see if there is a District or State DVD/CD available that can be used to update your computer with the larger updates.

All steps outside of the Appendix should be performed as part of this tune-up.

Control Panel Convention. This document uses the Control Panel Category View. The view you are using can be determined by going to Start -> Control Panel and observing the link, “View by,” in the upper right-hand quadrant. If it indicates “Category view,” you are in Category View and no action is necessary. If it indicates “Large Icons” or “Small Icons” you should change it to Category View.

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PROCEDURES FOR ALL WINDOWS 7 PROFESSIONAL COMPUTERS

1. Turn on the computer and boot to the Windows login screen and login as you normally would.
2. If you don't have a "Volunteer" User Account, create one (or modify your volunteer account, if needed, to match the below instructions). DO NOT rename an existing account to Volunteer. That can cause huge network problems with respect to TaxWise.
 - a. In Control Panel > User Accounts and Family Safety > User Accounts
 - b. Click "Manage Another Account"
 - c. Click "Create a new account"
 - d. For the name of the account, enter "Volunteer" and select "Administrator?"
 - e. Click "Create account"
 - f. Now, double-click the Volunteer account and click "Create a password"
 - g. Enter the current TY 2011depot computer password, verify it, and enter "Depot Computer" as the Password Hint
 - h. NOTE: If your state/local authority has a different convention for username and password, get that information from them and modify this step, accordingly.
 - i. Close the window
3. The Numeric Lock should not be turned on for laptop computers. Most models will have a NumLock light to indicate the status. Toggle the NumLock key (by pressing NumLock or Fn + NumLock) to find the light. The light should be off.
 - a. If there is no light, and the NumLock is ON, you will not be able to correctly type "Volunteer" in an application such as Notepad. In this case, toggle the NumLock key.
4. If necessary, log off as your current user and login as "Volunteer"
5. Change date, time zone, and time
 - a. Double-click the time in the System Tray (right-hand side of the task bar)
 - b. Click "Change date and time settings"
 - c. Click "Change time zone"
 - d. Change to the correct time zone – check daylight savings time, if appropriate
 - e. Click OK
 - f. Click "Change date and time"
 - g. Change date and time if required
 - h. Click OK

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i. Click OK.

6. In Control Panel -> System and Security -> System

- a. Under the “Windows Edition” group, check to see that Windows Service Pack 1 is installed. If it is not yet installed, you must install it, following the instructions later in this document.
- b. Under the “Computer name, domain, and workgroup settings,” verify the computer name and workgroup are properly set to a unique name for your site and VOLGROUP, respectively
 - i. If either of these need to be changed
 1. Click the “Change settings” button and change the Computer Name to a unique name for the site(s) you will be working at. You may have to consult your site manager or Technology Coordinator for this name.
 2. Change the workgroup to VOLGROUP. NOTE: If your state/local authority uses a different workgroup name, use that name.
 - ii. Click OK
 - iii. Click OK
 - iv. NOTE: If you use your computer in a home network and that network is not named VOLGROUP, your home network will not be configured properly anymore. In that case, you will either have to re-configure the other equipment on your network to use the VOLGROUP workgroup or change your computer workgroup name when you switch the computer between home and site use
- c. Click “Advanced system settings” in the upper-left quadrant.
 - i. Click Environment Variables. Look both in the User variables and the System variables for the variable name “**workstation**”. If you find it in either place, delete that variable. NOTE: If your state/local authority recommends not changing the value, leave it as it is.
- d. Press OK
- e. Restart the computer.

7. If not already connected, connect the computer to the Internet with a safe high-speed connection – wired or wireless.

NOTE: If step 6.a indicated that you need to install Service Pack 1, be aware that it is a huge update. With a broadband connection to the Internet, it is feasible to install it online using Windows Update. Alternatively, if you do not have continuous access to a broadband Internet connection you may be able to get the update on a CD/DVD from your Technology Coordinator.

8. Install Microsoft Security Essentials (MSE) if you do not already have an Anti-Virus program installed. The program can be found at this link:
http://www.microsoft.com/security_essentials/. Alternatively, do an Internet Search for

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“Microsoft Security Essentials” and choose the link that goes to Microsoft to find and download the file.

Detailed instructions for installing and configuring MSE and for configuring the Windows Firewall are contained in a separate document, “Antivirus Program for TaxWise Computers 2011,” posted in the “Security” topic under the “Hardware” tab of the Technology page of the AARP Tax-Aide Extranet www.aarp.org/tavolunteers.

NOTE: If your computer already has a reputable anti-virus program installed, e.g., Norton, McAfee, Kaspersky, etc, and you keep it updated, there is no need to install MSE.

9. Update Windows using the Express Update. If Service Pack 1 is not installed, install it at this time.

- a. Click Start -> All Programs -> Windows Update
- b. Click “Check for updates”
- c. Install all High Priority updates, including Service Pack 1
- d. When finished, repeat this procedure until there are no more updates to download

10. Update Windows again (as in step 9.)

- a. Install any High Priority Updates
- b. When finished, go to Windows Update, again
- c. Click the “...optional updates are available” link
- d. Select all .NET Framework 4 updates and download and install them
 - i. This update can take a long time
- e. Close all windows and return to the Desktop

11. Set computer to get Automatic Updates and turn on the Windows Firewall

- a. Start -> Control Panel -> System and Security
 - i. Click “Windows Update”
 1. Select “Change settings”
 2. Change to “Install updates automatically” every day at 3 AM
 3. Click OK and go back one page to “System and Security”
 - ii. Click Windows Firewall
 1. On left-hand side, click “Turn windows firewall on or off”
 2. Turn “On” for all cases
 3. Click OK

12. In Control Panel -> Appearance and Personalization

- a. Click on Folder Options..
 - i. On the View tab, verify the following:
 1. “Hide extensions for known file types” is unchecked
 2. “Don’t show hidden files and folders” is checked
- b. Click OK

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13. In Control Panel > Hardware and sound, click “Power Options “
 - a. Check “Balanced” and select “Change Plan Settings”
 - i. All items under “Plugged in” should be set to “Never”
 - b. Select “Change Advanced Power Settings”
 - i. “Require a password on wakeup” should be “Yes”
 - ii. Under “Sleep,” “Hibernate after,” select “Never”
 - iii. Under “Power buttons and Lid”
 1. “Power button action” should be “Shut down” in all cases
 2. “Sleep button action” should be “Do nothing” in all cases
 3. “Lid close action” should be “Do nothing” (if it exists), in all cases
 - iv. Click OK
 - v. Click “Save changes”

14. Change the following settings if they have not already been changed:
 - a. In Control Panel > Appearance and Personalization, click “Personalization”
 - i. Double-click “Screen Saver” in the lower-right quadrant
 1. Select “Blank”
 2. Change the Wait interval to 30 minutes
 3. Check the box “On resume, display logon screen”
 4. Click OK
 - ii. NOTE: You may prefer a different screen saver for your computer. That is okay, but the selection you make must have the capability to display the login screen after a 30 minute interval.
 - iii. Close all windows

15. If you have less than Adobe Reader X
 - a. Uninstall it, Start -> Control Panel -> Programs
 - b. Select “Program Features”
 - c. Select your Adobe Reader version and delete it
 - d. Restart the computer

16. Install Adobe Reader X by going to <http://get.adobe.com/reader/>. If the download has an option to download other software as well, e.g., Google Toolbar, uncheck that box.
 - a. Once installed, start Adobe Reader X, click Help, and click “Check for Updates”
 - b. Install any updates and close Adobe Reader X

17. Run the Secunia and Norton Online scans
 - a. Refer to the Extranet Document, “*Computer Security Scanning Procedure v3,*” at www.aarp.org/tavolunteers, under the Technology Hardware tab, Security group. This document gives procedures for running the scans and reporting the results.
 - b. T
The scans require that Java be installed. So, if given the option to install Java, accept it. Then the Secunia scan will notify you if Java requires an update.

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18. Run disk cleanup, Start -> All Programs -> Accessories -> System Tools, click Disk Cleanup and select the drive you want to clean up, i.e., C:
 - a. In the window that appears, click OK or change the files to delete to your preference and click OK.
19. Run defrag, Start -> All Programs -> Accessories -> System Tools, click Disk Defragmenter
 - a. Select the Disk to be defragmented
 - b. Click the “Defragment disk” button
20. Lastly, you may need to install a driver for a site printer. Links to printer driver download sites for most printers used in the Tax-Aide program can be found on the Extranet under the Technology Hardware tab, in the Networking section.

PROCEDURES FOR TAXWISE DESKTOP, ONLY

21. Install the .NET 4 Extended package. **NOTE: This installation must be accomplished to run TaxWise Desktop (standalone, client, or server) this year.** If you are connected to the Internet when installing TWD, the Extended package will be installed at that time and this step can be skipped.
 - a. Go to:
<http://www.microsoft.com/download/en/details.aspx?displaylang=en&id=17718>
 - b. Download and install the Extended package
 - c. Click Start -> Control Panel -> Add or Remove Programs and make sure that .NET Framework 4 Client Profile and Extended are installed
22. **Installation or adjustments to TrueCrypt volume(s) for the coming season** (not necessary for workstations in a client-server network). The latest version TrueCrypt installer (version 7.42 as of Oct 11, 2011) and the *Tax-Aide TrueCrypt Utility – Quick Start Guide TY 2011* can be found in the “Security” topic of the “Hardware” section on the AARP Tax-Aide Extranet Technology web page.
 - a. **If there is no TrueCrypt volume on the computer’s local hard drive**, use the AARP Foundation Tax-Aide TrueCrypt Utility to create a TrueCrypt volume on the system
 - b. **Highly recommended:** If the version of the Tax-Aide TrueCrypt Installer last used on this computer is **earlier than version 6.2 (for Tax Year 2009)**, use the latest TrueCrypt Utility to automatically convert the TrueCrypt volume to the latest TrueCrypt software on this computer.
 - c. **Recommended:** If the version of the Tax-Aide TrueCrypt Installer last used on this computer is **version 6.2 or version 6.3 (for Tax Year 2009)**, use the latest

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version TrueCrypt Utility to automatically convert the TrueCrypt volume to the latest TrueCrypt software on this computer.

- d. With your TrueCrypt volume(s) dismounted, **change the TrueCrypt password** on volumes P: (and S:, if used using files TPDATA.TC (and TSDATA.TC, if used), to the new encryption password that you have chosen for your district for this season. We recommend that you use the “Tax-Aide TrueCrypt Volume Password Changer” tool available for download in the “Encryption” topic of the “Software” section on the AARP Tax-Aide Extranet Technology web page.

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APPENDIX - OPTIONAL SOFTWARE

1. You may want to install the free viewers for Microsoft Office, Word, Excel, and Power Point, if you do not have Microsoft Office installed on your computer. It is not necessary to install these viewers if you have installed OpenOffice. You can download these from the Microsoft Office downloads web site:
 - a. Word Viewer 2003 – wordview_en-us.exe from this page:
<http://www.microsoft.com/downloads/details.aspx?FamilyID=3657CE88-7CFA-457A-9AEC-F4F827F20CAC&DisplayLang=en>
 - b. Excel Viewer 2003 - ExcelViewer.exe from this page:
<http://www.microsoft.com/downloads/details.aspx?FamilyID=1cd6acf9-ce06-4e1c-8dcf-f33f669dbc3a&displaylang=en>
 - c. PowerPoint Viewer 2007 - PowerPointViewer.exe from this page:
<http://www.microsoft.com/downloads/details.aspx?FamilyId=048DC840-14E1-467D-8DCA-19D2A8FD7485&displaylang=en>
 - d. To use these three viewers for Office 2007 documents you also need to first run Microsoft Update, (and the Office Compatibility Pack) from this page:
<http://www.update.microsoft.com/microsoftupdate/v6/default.aspx?ln=en-us>
 - e. After running Microsoft Update you need to install this Office Compatibility Pack from this web page:
<http://www.microsoft.com:80/downloads/details.aspx?familyid=941b3470-3ae9-4aee-8f43-c6bb74cd1466&displaylang=en>
2. There are also several free optional software programs that you may want to install on your computer. The list of these programs can be found in the “Other Useful Software for Tax-Aide” document on the Extranet under the Technology Software tab in the “Non-Tax Software” section. The document gives a description of the program and gives the link where it can be downloaded.